

HubSpot Integration Capabilities

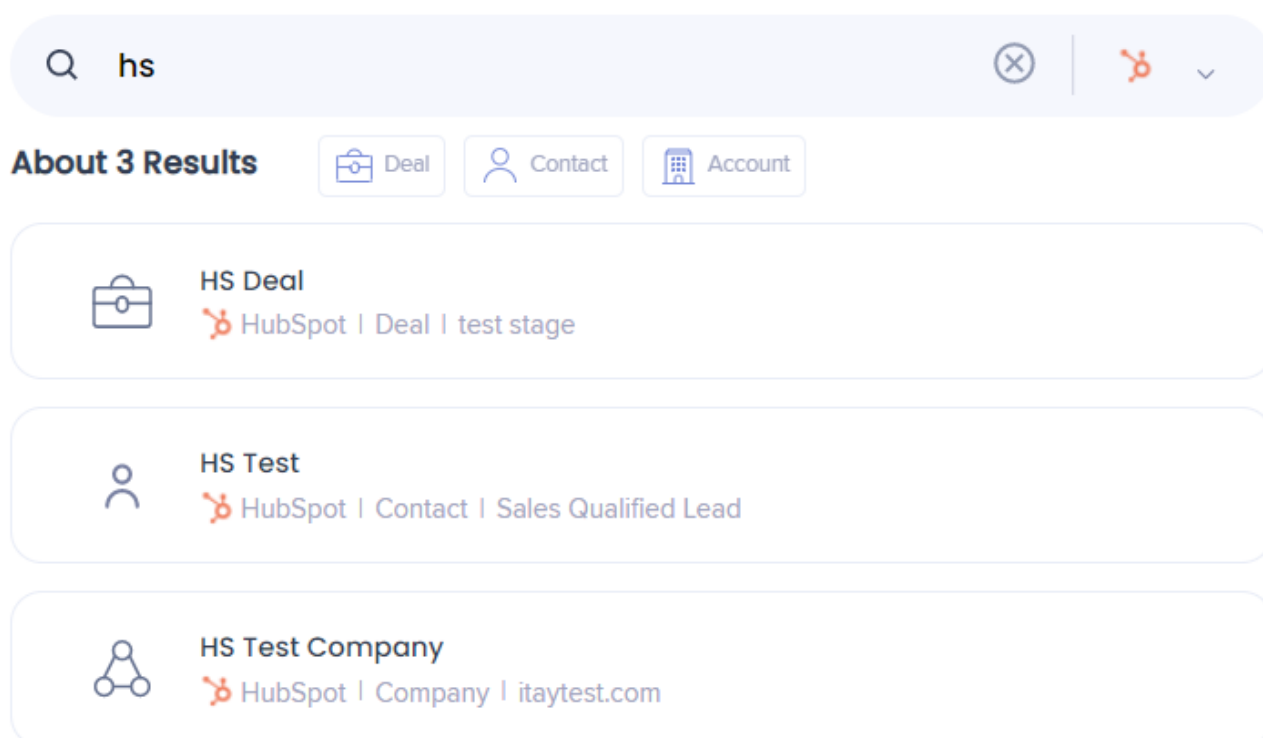
Brief Overview

HubSpot is a cloud-based CRM (customer relationship management software) designed to help sales and marketing teams.

HubSpot products and services aim to provide tools for customer relationship management, social media marketing, content management, lead generation, web analytics, search engine optimization, live chat, and customer support.

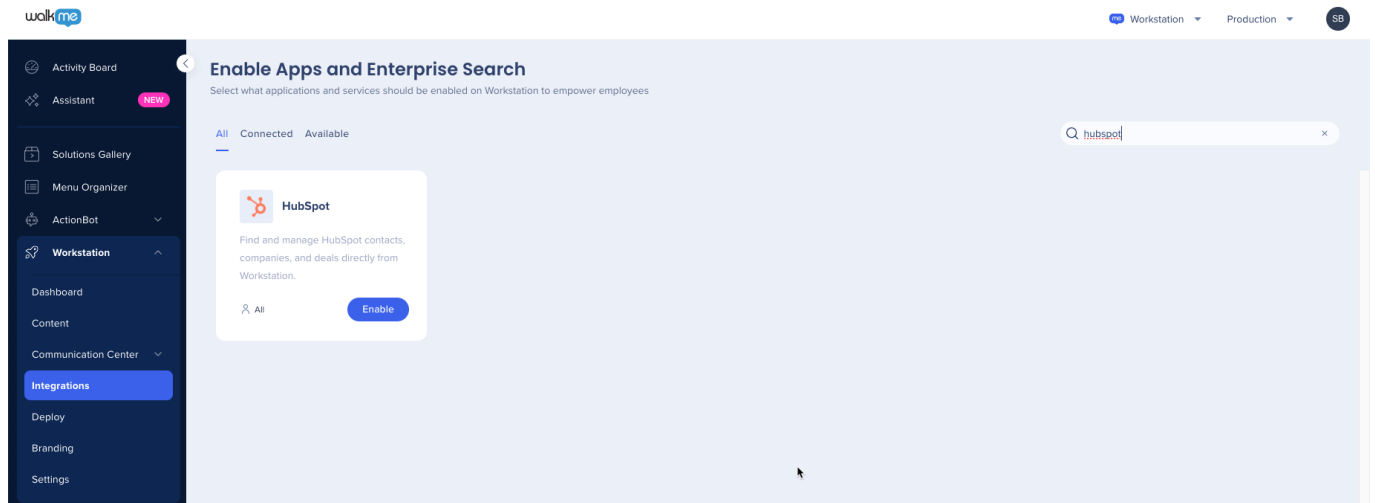
Use Cases

Search for HubSpot Leads, Contacts and Companies from the home screen widget.

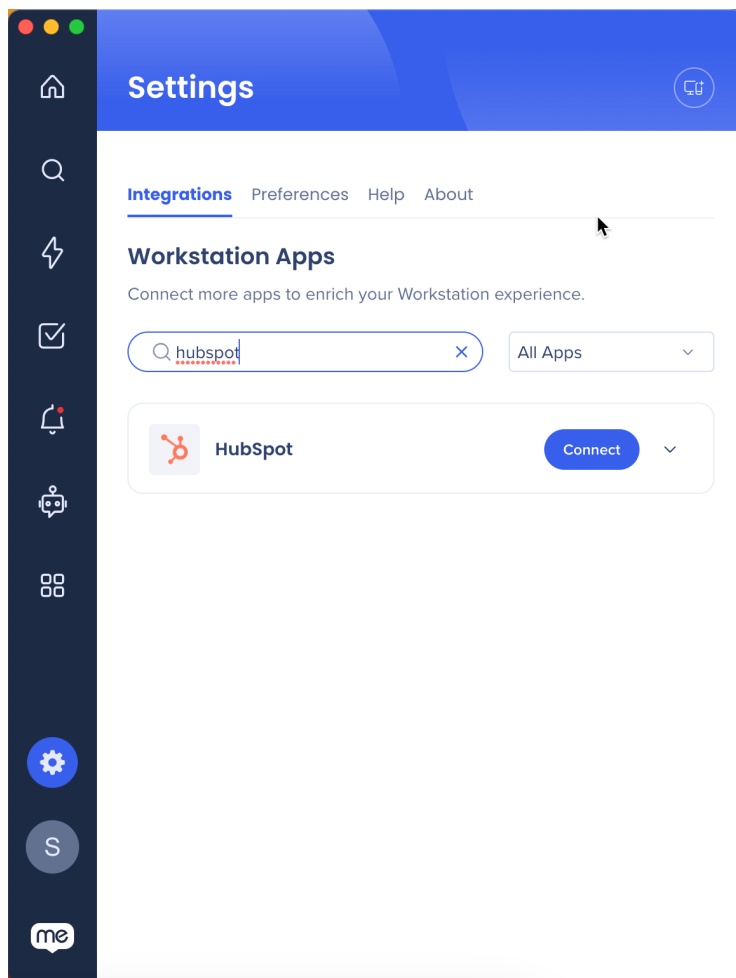


Enable Hubspot

1. Navigate to the [Workstation Integrations page](#) in the console
2. Search for **Hubspot**
3. Click **Enable**



4. Navigate to the Settings page in Workstation. Hubspot will appear in the Integrations tab
5. Click **Connect**



6. You will be asked to connect WalkMe Workstation to Hubspot. Select your account

7. Click **Choose Account**



Connecting **WalkMe Workstation** to **HubSpot**

WalkMe Workstation by walkme.com

Choose an account

NAME	DETAILS
<input type="radio"/> WalkMe	walkme.com 143789882

Choose Account

8. Click **Connect app**





Connecting **WalkMe Workstation** to **HubSpot**

This app hasn't been reviewed or approved by HubSpot
Make sure you trust this developer before connecting it to your account

WalkMe Workstation by walkme.com

This app is requesting access to your HubSpot account. Continue connecting if you agree.

-  **Manage and view your CRM data**
 View properties and other details about deals.
 View properties and other details about companies.
 View properties and other details about contacts.
-  **Basic HubSpot account information**
 This includes your user email address and the account's primary domain.

Connect app

Cancel

This site is protected by reCAPTCHA and the Google [Privacy Policy](#) and [Terms of Service](#) apply.

9. Done!

Segmentation

Integrations can be segmented to a sub-set of users and audiences, rather than being enabled for all end-users. This feature streamlines the integration process and helps to ensure that users are only using the integrations that are relevant to their work.

To segment a Workstation integration:

1. Navigate to the [Workstation Integrations page](#) in the console

2. Click the **All button** on the integration you would like to segment

3. Click **Select specific recipients** in the Manage Access popup

4. Select the audiences or individual users from the dropdowns to handpick who can use the integration

5. Click **Apply**



<

Manage access

×

Select who can use this integration

☐ All recipients

☒ Select specific recipients...

Audiences

↺

Select audiences

▼

Individual recipients

👤

Select user

▼

Cancel

Apply